

Z^X VENTURES [RETAILER]



2018
ANNUAL
REVIEW

WHY ARE WE HERE?

TO REINFORCE THE IMPORTANCE OF ONLINE BEER



2nd

Largest grocery category (across online & offline)



4.6%

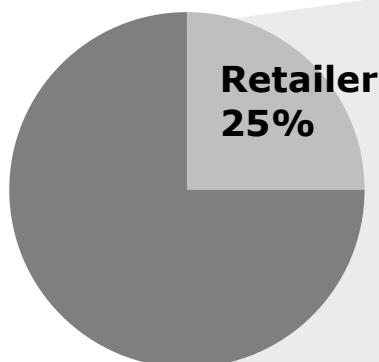
YOY growth,
strongest rate
across grocery
categories



2.3x

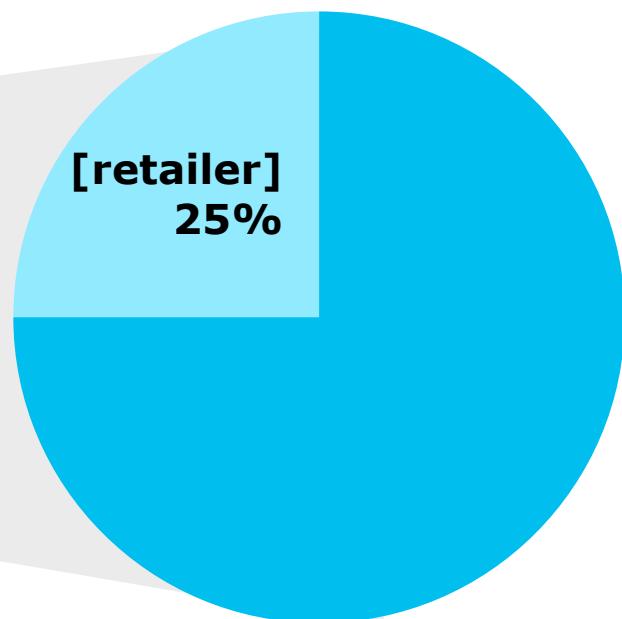
Basket ring
when beer is in
an online order

TO CAPTURE AN OPPORTUNITY



\$B Market in 2018

of which [retailer]
currently has X% share



An \$B Market in 2020

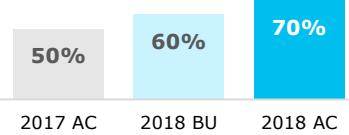
\$B in possible revenues if
[retailer] achieves fair share

2018 PERFORMANCE

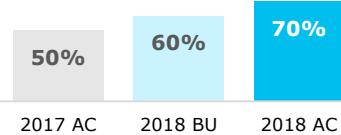
WHAT WE ACCOMPLISHED

JBP METRICS

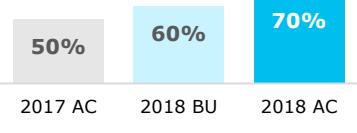
Category Growth



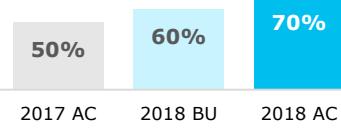
Beer Penetration



Mkt Share



Gross Margin



OTHER KPI's

XX% image compliance

#X in search rankings

XX% OOS rate

HOW WE ACCOMPLISHED IT

HIGHLIGHTS

Largest category

XXX

Fastest growing

XXX

Most wanted brands

LOGOS

KEY INITIATIVES

VISUALS OF LARGE/MULTI PACKS,
MARKETING ACTIVATIONS, ETC.

OPPORTUNITIES TO IMPROVE

WHAT'S WORKING



Dedicated
Teams



360
Promotions



Planning
Together

WHAT COULD BE BETTER



Online
Assortment



Category
Awareness



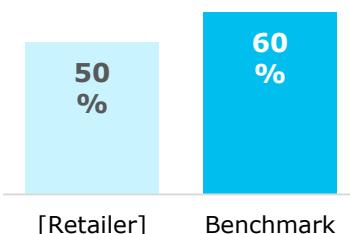
Repeat
Purchasing

[RETAILER] VS.

BENCHMARKS

CATEGORY GROWTH

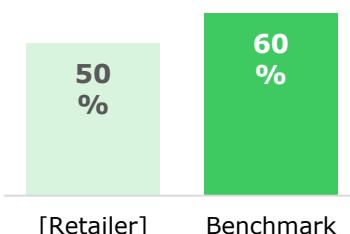
HOW WE COMPARE



Visual examples of what peers and competitors are doing to optimize this KPI

BEER PENETRATION

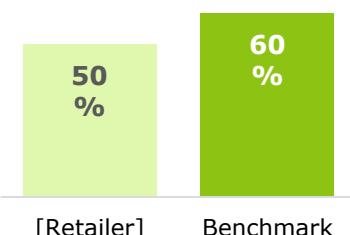
HOW WE COMPARE



Visual examples of what peers and competitors are doing to optimize this KPI

MARKET SHARE

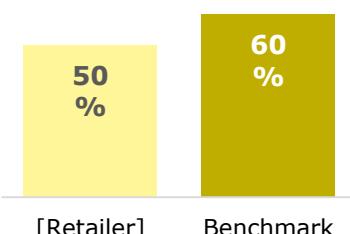
HOW WE COMPARE



Visual examples of what peers and competitors are doing to optimize this KPI

GROSS MARGIN

HOW WE COMPARE



Visual examples of what peers and competitors are doing to optimize this KPI

LOOKING AHEAD TO

2019 IMPROVEMENT AREAS



Online Assortment



Category Awareness



Repeat Purchasing

IMPROVEMENT INITIATIVES

Insight: Large (16+) and medium packs over-index online vs. offline

Large Packs
Address unique value prop of shopping online



Discovery Packs
Unique bundles consumers can't find in stores



Insight: <14% of shoppers are unaware they can buy beer online

Traffic Generation
From social, search, & other sites



In-Site Media
Cross-category activations & consideration banners



Insight: 70% of eRetail purchases are done through favorites

Favorites & Lists
Pre-defined, automated, & user-generated

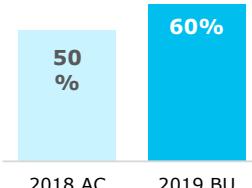
The screenshot shows a navigation bar with tabs for Groceries, Favourites, Recipes, Special Offers, Autumn Drinks Festival, and Deliver. Under 'Favourites', there are links for 'My Favourites' (items bought online or in-store), 'Last Order' (items bought in my last order), and 'My Usuals' (items I buy regularly online). A note at the bottom states: "My Usuals are based on your orders delivered in the last 3 months."

Auto Replenish
Ensure shoppers don't forget to add beer to cart

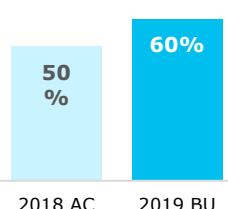
The screenshot shows a 'Your Subscribe & Save' section with a red arrow pointing to a 'Change delivery date' button. It displays upcoming deliveries and subscriptions. A note says: "Last day to update this order Friday, August 18". Below it, there's a section for 'You have selected extra savings! Add more products' with items like HP Paper, Multi-purpose... and Color Giclee Stronger.

2019 KPI GOALS

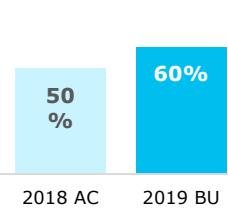
Category Growth



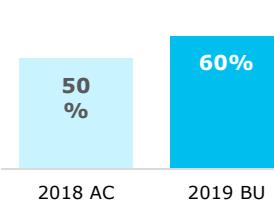
Market Share



Gross Margin



Beer Penetration



WHY PARTNER WITH

US?

WHAT ABI BRINGS TO THE TABLE

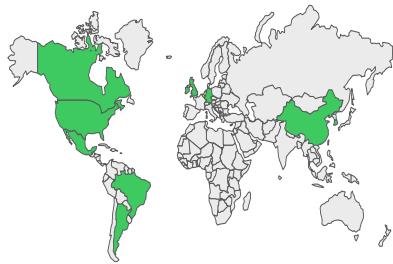
Leading Portfolio

With 8 of the top 10 brands worldwide



Global Footprint

& leadership positions across the world



Marketing Assets

Properties & partners to drive acquisition



WHAT ZX-VENTURES BRINGS TO THE TABLE

Toolkits & Best Practices

To help you grow the category



Experienced, Dedicated Team

Partners to help you execute & win



Proven Results

A track record of helping our JPB partners succeed.



Example for a Top 3 Global Retailer:

Grew the online beer category by +\$820M in 3-years by using JPB to identify & execute on opportunities, including brand activations & site improvements.

Category Sales by Year



Z^X VENTURES [RETAILER]



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ANNUAL
REVIEW



**PLACEHOLDER FOR ONE-PAGE
SUMMARY OF ABOVE**